CRIS

Clinical Research Information System

Quick Reference

For help, call the
CRIS Support Center at
301.496.8400

For more information
about CRIS, go online
http://cris.cc.nih.gov/

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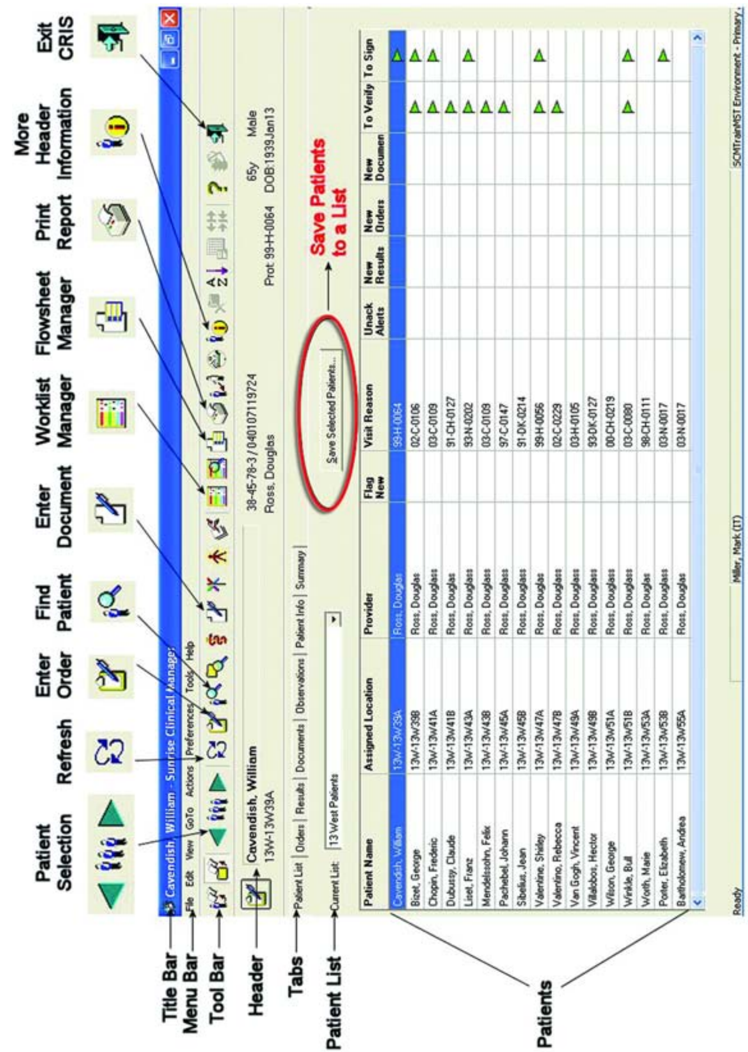

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Quick Reference

Contents

CRIS Access

Log On to CRIS

1. On the Standard Clinical Desktop or from **Citrix**, double-click the **CRIS** icon.
2. Type your **CRIS name** and **password** in the defined fields.
3. Click **OK**.

Change Your Password

1. From the menu bar, select **Preferences – Change Password**.
2. In the **Old Password** field, type your current password.
3. In the **New Password** field, type your new password.
4. In the **Confirm New Password** field, type your new password again.
5. Click **OK**.

Logging Off CRIS

Click on the **Exit Door** icon , located on the toolbar.

Patient List

Find a Patient NOT on a Patient List

1. Select the **Patient List** tab.
2. Click the **Find Patient** icon  in the toolbar at the top of the screen. A window displays.
3. Within that window, select one of the tabs (**Name**, **Identification**, **Provider**, or **Other**) to search for a patient.
4. Enter the required information. Under the name tab, for example, enter the patient's last name or 2 to 3 characters of the last name. Click **Search**. A list of patients who meet the criteria entered displays.
5. Click on the name of the patient and then click **Show Visits**. A list of visits for that patient displays.
6. Select a visit from the list, then click **OK**. This adds the patient to a **Temporary List**.
   Note: *The temporary list you create displays until you sign off CRIS.*

Create a Personal Patient List

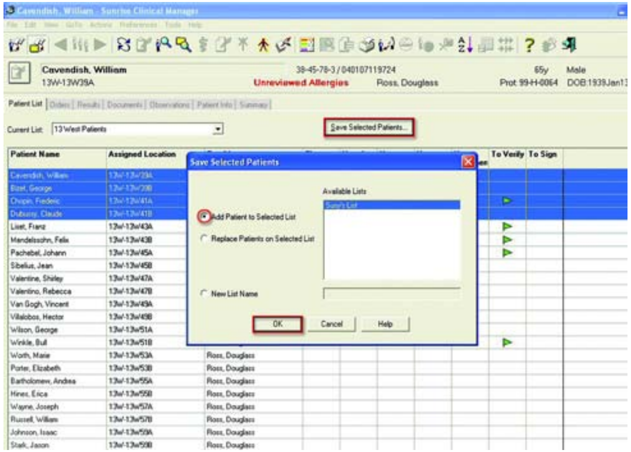
You can create, replace, and edit your own list(s) of patients by:

- using the **Find Patient** function or
- selecting them from another list and then clicking the **Save Selected Patient** button.

The admissions system does not automatically update personal lists when a patient is admitted, transferred, or discharged. You must maintain your own lists.

To create a list:

1. Select the **Patient List** tab.
2. Click the drop-down arrow next to the **Current List** field and select a facility-defined patient list (those without an *****).
3. Hold down the **Ctrl** key and click on the names of the patients you want to add to your personal list.
4. With the names highlighted, click **Save Selected Patients**.



5. Select the **Add** or **Replace** option when adding or replacing patients to an existing list.

6. When creating a new list, select the **New List Name** option.

7. Type the new names for your personal list in the field on the right.

8. Click **OK**.

9. Your list appears in the drop-down menu for **Current List** with an *.

Flags

Flag Notification

Flags provide a visual indicator that new results, orders, and documents have arrived for a patient since you last viewed the information.

There are two types of flag notifications:

Green flag: displays for all new results within normal range, all new routine orders, new orders requiring verification, new orders requiring signature by another prescriber, and new documents.

Red flag: displays for one or more abnormal results, new stat orders, orders for you to sign, and unacknowledged alerts.

To turn on the **Flag New** function, go to the **Patient List** tab.

- For individual patients: Double click in the **Flag New** column next to the patient name to turn on the notification. Double click again to turn it off.
- For multiple patients: Highlight **names**. Go to the menu bar, select **Actions** > **Flag New-On** or **Flag New-Off**.

Clearing Flags

When you clear a flag, it clears the flag only from your screen, not from the screen of other users viewing the same patient's records.

1. From the **Patient List** tab, double click on a flag (**New Orders**, **New Results**, or **New Documents**) for the selected patient.
2. The corresponding window opens (**New Orders**, **New Results**, or **New Documents**). Scroll through the list presented to view all the information.
3. When finished, click **Clear Flag** to clear that particular flag from the column on your patient list and to close the window. If you wish to hold off temporarily on clearing the flag, click **Don't Clear Flag**. The flag remains in the column until you clear the flags. ***Note:*** *New orders/results will be added to the existing list in the box, if you do not clear the flag.*

Filters

Using Filters to View Results, Orders, and Documents

Filters provide a variety of ways to view patient information. The following filters are found in the view control panel under the **Orders**, **Results**, and **Documents** tab on the left side of the screen.

- **Chart: All Available** refers to all information for all visits. **This Chart** is limited to this visit.
- **Since:** Used to specify a date range for viewing. When you know exact dates, enter the start date in the **Since** field. If there is an end date, enter the date in the **To** field. You can also use pre-defined timeframes from the drop-down list (such as "**One week ago**" or "**One month ago**"). You should not use both options at the same time. ***Note:*** *If a timeframe is used, it changes the* ***Since*** *date.*
- **Selection:** This option lets you view **ALL** information by department or category. Other categories may also be available.

- **Display Format**: This option gives you several ways to view information, which may appear as a **Report**, **Summary** or grid for trending data. In the **Orders** tab, you can sort by department, requester, or details.
- **Status Filter**: In the **Orders** tab only, you can view orders based on their status, such as **Active/In Process**, **Completed**, and **Pending Verification**.
- **Sort Sequence**: In the **Documents** tab only, documents can be sorted by author, date, discipline, or category.

Orders

Enter an Order as a Prescriber

1. Click the **Enter Order** icon located on the toolbar. 
2. In the **Session Type** field, select the type of order from the drop-down menu provided. ***Note****: The default type of order session is* ***Today Outpt/ Current Inpt****. If you want to place an order on hold, to be initiated at a later date, choose* ***Future Outpt/Pre-Admit****. When you enter an order as* ***Future Outpt/Pre-Admit****, enter a release date in the reason field. To order medications for a patient to take home, choose* ***Take Home Medications****.*
3. There are two ways to find individual orders: through the browser or manually.

   To start browser:

   - Select a department or category from the left pane of the **Order Browse**.
   - When you select a department or category, any sub-departments or subcategories display in the left pane, and individual orders in the right pane.

   To enter manually:

   - Select **Manual Entry** from the drop-down list on the left. ("**Type here to enter order name**" will be highlighted.)
   - Enter part of the name of the order you want. The right pane of the **Order Browse** displays the orders that begin with the characters you typed. ***Note:*** *You do NOT need to press the* ***Enter*** *key here.*
4. Select the order from the order window. Click **Add** or double-click on the order.

5. An order entry requisition displays. Complete the appropriate fields. ***Note:*** *The blue-starred fields are required fields. If you want an order with a condition, click the checkbox next to* ***Conditional Order****. If you want a repeating order, click the* ***Repeat*** *button. You will not be able to submit the order unless all required fields are completed.*
6. Click **OK**. The order item displays in the Order Entry Summary window at the bottom of the screen.
7. To add additional orders, repeat steps 4 – 6. As each order is selected, all orders display in the Order Entry Summary window and remain pending until they have been submitted. ***Note:*** *Orders are NOT completed until you have submitted them.*
8. Review all the orders in the Order Entry Summary window to make sure that they are correct. An order can easily be edited or deleted by selecting it and clicking **Edit** or **Delete**.
9. Click **Submit**.

Enter an Order on Behalf of a Prescriber

1. Click the **Enter Order** icon located on the toolbar.
2. Select the **Other** radio button.
3. In the **Requested by** window:
   - In the first two fields, accept the default of **All**.
   - In the **Requested by** field, type the first few letters of the requester’s last name and pause for a few seconds while the application comes up with a list of matching names.
   - Select the appropriate requester’s name from the list that appears below.
   - In the **Source** field, click the drop-down arrow and select a source for the order (telephone, verbal, or written, for example).
4. Click **OK**.
5. Follow the instructions for entering an order as a prescriber.

Orders

Enter Order Sets

Order sets are multiple orders grouped together for entry all at the same time. There are three types of order sets:

- **Non-protocol order sets**, such as Blood Component Prep and Infusion; Transfusion Reaction: Red/ White Cells OS.
- **Protocol order sets** designed for a specific protocol. Some are grouped by visit or phase. Others are grouped by type of order.
- **Quick orders**, which are medication orders pre-filled with common dosages, frequencies, and administration routes.

To enter an order set:

- Locate an order set on the **Order Entry Worksheet**. Click **Add**.
- When a list of order items displays, select the desired orders by clicking on the box next to each order. Click **OK**.

3. The system processes and checks each order. If it finds duplicate orders or mandatory fields left blank, you'll see an alert or warning to acknowledge.

4. Select the orders with messages. Click **Edit**.
5. Enter the required information.
6. Click **OK**.
7. Click **Submit**. All the orders will be processed.

Activate a Conditional Order

Use this function when the specific condition placed on the order has been met. This processes the order.

1. Select your patient in the **Patient List** tab.
2. Select the **Orders** tab.
3. Select the **Conditional Order** you wish to activate.
4. Right-click on the order and select **Activate**. The order is placed on the **Order Entry Worksheet** in the **Order Summary** window. You can modify the order before submitting by selecting the order and clicking **Edit**.
5. Click **Submit**.

Discontinue an Order

1. Select your patient in the **Patient List** tab.
2. Select the **Orders** tab.
3. Select the order to be discontinued.
4. Right-click and select **Discontinue/Cancel**.
5. On the **DC/Cancel** dialog box, select the **Other** radio button if you are discontinuing as an agent on behalf of the prescriber.
6. Type the reason the order was discontinued or select a reason from the drop-down list.
7. Modify the date and time, if necessary.
8. Click **OK**.

***Note:** To Discontinue/Cancel or Discontinue/Reorder multiple orders at once, click the **DC/Cancel** button at the bottom of the **Orders** tab window and select the appropriate radio button and the appropriate orders on the **Discontinue/Cancel Orders** dialog box.*

Suspend, Unsuspend, Release, or Complete an Order

From the **Orders** tab, you can right-click on a specific order and suspend, unsuspend, release an order on hold, or complete an order (depending on your security rights).

Documentation

Entering Information in a Flowsheet

1. Click the **Enter Document** icon. 
2. There are two ways to find individual documents: through the browser or manually.

   To start browse:

   - Select a department or category from the left pane of the **Document Browse**.
   - When you select a department or category, any sub-departments or subcategories display in the left pane, and individual documents display in the right pane.

To enter manually:

- Select **Manual Entry** from the drop-down list on the left. ("**Type here to enter document name**" is highlighted.)
- Enter part of the name of the document you want. The right pane of the **Document Browse** displays the documents that begin with the characters you typed. ***Note:*** *You do NOT need to press the* ***Enter*** *key here.*

3. Select the document from the document window. Click **Open** or double-click on the document.
4. The document defaults to the current date and time, but can be changed, if necessary.
5. Click in the first empty cell to start documenting. Leave any cells blank that do not apply.
6. To save your note, click **Save**.  This documentation is added to the patient record.
7. Click **Close** to close the window.

Enter Information in a Free Text Note

To find your document, use steps 1 – 4 under **Enter information in a flowsheet**. Free text notes do not offer menus but do provide space for entering information manually.

Enter Allergies

1. Select the **Patient Info** tab.
2. In the **Data Entry** list, select **Allergy**.
3. Select the **Type** of allergy from the drop-down menu.
4. Select the **Allergen**.
5. Select a **Reaction**. ***Note:*** *If there are multiple reactions, select the most severe. Enter additional reactions in the* ***Description*** *field.*
6. Enter additional information as needed.
7. Click **OK**.

Enter Care Provider

1. Select the **Patient Info** tab.
2. In the **Data Entry** list, select **Care Provider**.

3. Select the **Type** of care provider.
4. Select the care provider's **Role**.
5. In the **Name** field, type the first few letters of the care provider's last name and pause for a few seconds while the application comes up with a list of matching names.
6. Select the appropriate care provider from the list.
7. Click **OK**.

Enter Comments

Some comments from **Admissions** are incorporated into **CRIS**, appearing in all capital letters. You can add other comments about the patient as needed.

Seven types of data entry are available to you:

- Advance Directives
- Interpreter
- Prosthesis
- Protocol Appts
- Special Needs
- VAD Line Hx
- Other

1. Select the **Patient Info** tab.
2. In the **Data Entry** list, select **Comment**.
3. Select the **Type** of comment.
4. Enter your comment in the **Comment** field.
5. Click **OK**.

Enter Height and Weight

Each time **Height** and/or **Weight** is entered on the nursing **Vital Signs Flowsheet**, the patient-information field called **Height/Weight** is automatically updated. These entries are used to calculate medication dosage. The **Height** and/or **Weight** can be manually changed using the following procedure:

1. Select the **Patient Info** tab.
2. In the **Data Entry** list, select **Height/Weight**.
3. Enter the **Current Height**.
4. Enter the **Current Weight**.
5. Click **OK**.

Enter Significant Events

When you capture major events (called **Significant Events**), they can be viewed across visits and need not be re-entered. There are five data-entry types available to you:

- Consents
- Immunizations
- Isolation Precautions
- Transfusion History
- Tracheostomy History

1. Select the **Patient Info** tab.
2. In the **Data Entry** list, select **Significant Event**.
3. Select the **Type**.
4. Select the **Event**.
5. Enter additional information as needed.
6. Click **OK**.

Print or Preview a Report

1. From the toolbar, click the **Print Reports** icon. 
2. From the **Report Category** field, select **Result**, **Order**, or **Document** reports.
3. Select the appropriate report.
4. Click **Preview** to view your report or **Print** to print it.

Re-print Order Requisitions

1. From the menu, select **File**, **Re-Print Orders**.
2. In the **Requisition** field, select the order requisition that you want to re-print.
3. Modify the **From Date** and **To Date**, if needed.
4. Click **Search**.
5. Select the patient for whom you need to re-print orders.
6. Click **Print** to print to the default desktop printer.

Medications

Medication Worklist

The **Medication Worklist** uses symbols to represent actions taken on a medication. Various colors are used to designate the medication and IV schedule type (see table below). Your current view may not include every scheduled type.

Type of Worklist Schedule
with Color-Coding and Symbols

Schedule Type	Grid	Description
Scheduled Administration times are predefined.	Yellow 	The task description cell and the scheduled time cells are yellow with a black diamond.
Unscheduled Does not have a defined first administration time. Once the first dose is given, subsequent administration times are defined.	Yellow	The task description cell is yellow with a black diamond. No black diamonds display in the time-grid cells. A yellow bar indicates the medication start and stop time.
Variable Schedule Has variable predefined administration times (e.g., every 4 to 6 hours).	Green trough 	The task description cell is green. A green trough displays in the time-grid cells starting at the first possible administration time.

Schedule Type	Grid	Description
Overdue The administration time has passed.	Red 	The task description cell and the overdue-scheduled-time cells are red with a black diamond.
Manually Scheduled The administration time is determined based on patient needs or on an event, such as arrival at the OR.	Blue 	The task description cell is blue with a black diamond. No color or symbols display in the time grid.

Schedule Type	Grid	Description
PRN Administered as needed.	Magenta trough 	The task description cell is magenta with no symbol. A magenta trough displays in the time-grid cells starting at the first possible administration time.

Schedule Type	Grid	Description
Continuous Administered continuously.	Cyan (light blue) bar 	The task description cell is cyan (light blue) with a black diamond. A cyan bar indicates the medication start and stop time. No black diamonds display in the time-grid cells.
Conditional Administered based on an event (such as a change in a lab value).	Purple 	The task description cell is purple with a question mark. No color or symbols display in the time-grid.

Schedule Type	Grid	Description
Completed All ordered doses have been charted as given or not given.	White 	The task description cell is white with a checkmark. All completed doses display with a checkmark and your initials (if given) or a red X (if not given).
Discontinued/ Canceled The order has been discontinued or canceled.	White 	The task description cell is white with a single line through the cell. All future doses display with a line through the black diamond in the time-grid cells.

Document a Scheduled Medication as Given

1. Right-click on the grid cell representing the medication and the scheduled time of administration (highlighted in yellow, with a black diamond).
2. Select **Mark as Done**.
3. The **Medications Notations** window may display. Complete the form as necessary. If you are documenting this medication after it was administered, document the actual date and time it was administered.
4. Click **OK**.

The medication is marked as **given**. Your initials display next to a checkmark.

Document a Scheduled Medication as Not Given

1. Right-click on the cell representing the medication and the scheduled time of administration (highlighted in yellow, with a black diamond).
2. Select **Mark as Not Done**. The **Task Not Done** dialog box displays.

3. Select the appropriate reason from the list.
4. Click **OK**.

The medication is marked as **not given**. A red X displays in the cell. 

Change the Schedule for a Scheduled Medication

1. Right-click on the cell representing the medication and the scheduled time of administration (highlighted in yellow, with a black diamond).
2. Select **Reschedule – All Instances**. The **Change Schedule** window appears.
3. Click the drop-down arrow for **Reason**. Select the appropriate reason from the list.
4. Select a new start time for the first instance.
5. Click **OK**.
6. Click the **Refresh icon**.

The medication will be rescheduled.

Reset the Medication Status (Unchart a Dose)

You can use this procedure if you have documented the wrong medication or patient — to reset the dose for the patient's chart.

1. Right-click on the cell that is incorrectly documented.
2. Select **Edit–Reset Task Status**. The **Reset Task** dialog box displays.
3. Click the drop-down arrow for **Reason**. Select the appropriate reason from the list. You can also type in a reason.
4. Click **OK**.
5. Click **Refresh**.

The medication dose shows as available to be given. ***Note:*** *If you reset a scheduled dose, the black diamond reappears. If you reset a **PRN** medication the magenta trough reappears. If you reset a continuous IV, the cyan bar reappears.*

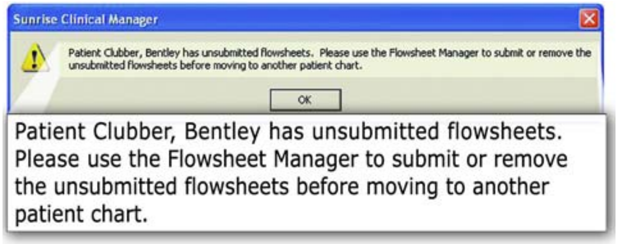
Setting Worklist (Medication List) Filters

You can change the view for the worklist manager in several ways by using filters. For example, you can set a filter to see the worklist (medication list) for a certain duration of time such as 8, 12, or 24 hr.

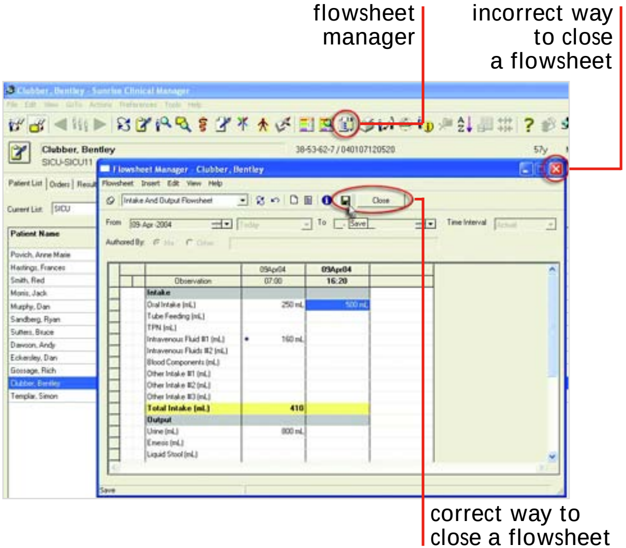
Troubleshooting Tips

Unsaved Flowsheets

If you close a flowsheet incorrectly by selecting the X instead of the close button, the flowsheet closes without being saved. If you try to document on another patient, you see this message:



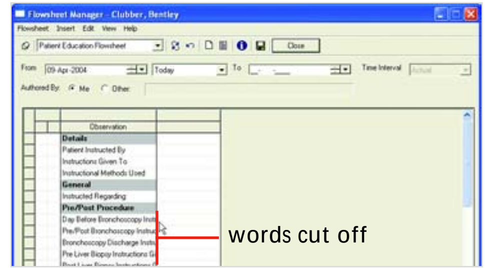
To resolve this, select the **Flowsheet Manager**. The unsaved flowsheet displays. Save and close the document correctly by clicking the close button. Now you are ready to move to another patient's chart.



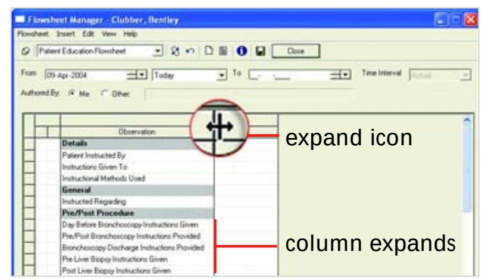
Troubleshooting

Expanding Columns

At times you may find that you cannot read all the information in the column.



Solution: widen the columns. Place your curser over the column's right border. When the cursor changes to a double-headed arrow, left-click, hold the left-click, and drag the borders to the right. The column expands.



Troubleshooting

Refresh

Clicking the **Refresh** icon ensures that any previously unrecorded new data is displayed.

For MAC Users

Some of the functions of CRIS use the PC's right mouse button, but Apple mice have only a single button. You can simulate this "right click" on a Macintosh by holding down a "modifier" key when you click the mouse. If you are using CRIS through the web, this modifier is the Apple key (the key just to the left of the spacebar).

If you have downloaded the CRIS client to your desktop, and are not using the web, the modifier key is the "option" key. If you use a 2 button with a Macintosh running OS X, the right mouse button should work properly in all of these situations.

For further help, call the CRIS Support Center at 301.496.8400

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